



## Exercise Builder Online Training

### Training Transcript for Module 9 Plans and ExPlan

This is Module 9 — Plans and ExPlan of the Exercise Builder Online Training.

In this module, you will learn how to use pre-developed Safety, Security, and Logistical templates that can be customized for use at your site/facility. You will also be able to generate and review your exercise plan documents.

At the end of this module, you will have developed your Safety, Security, and Logistical Plans. In addition, you will be able to review the first draft of your exercise plan and make changes to select templates and generate your Exercise Plan as a single Microsoft Word document. You will then be prepared to go to Module 10 — After Action Report.

Go to step 11.1.

This step provides pre-developed Safety, Security and Logistical Plans templates that can be customized for use at your site/facility.

If you already have site specific plans developed for your site/facility exercises, you may import your plan template into Exercise Builder.

Click the Next Arrow to begin Step 11.2 Exercise Safety Plan.

To use the generic Safety Plan that comes with Exercise Builder without modification, click the Generate & Save Document: Exercise Safety Plan link.

This step also provides you the opportunity to customize the generic safety plan included with Exercise Builder for use during your exercises.

To modify the generic safety plan, click the Edit Current Safety Plan Template link. This takes you to a Microsoft Word document template named SAFETY\_PLAN\_Temp.docx.

Make whatever changes are necessary to meet your site specific requirements.

Save the new Word document template with a new name. Close the Word document to go back to Exercise Builder.

To re-open the Word document template you just created, click the Select a Different Safety Plan Template link to select it.

After review, close the Word document template to go back to Exercise Builder.



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Note 1: If you already have a site-specific safety plan in a Microsoft Word (.docx or .doc) format, you can use it in Exercise Builder instead of the generic one. To do this, click [Select a Different Safety Plan Template](#) link, navigate to your plan, and select it.

Note 2: If you send the Exercise Builder file (.EBF) to another user, the Safety Plan template you developed does not go with the file. To send a template with an .EBF file extension, you must send the modified template along with your Exercise Builder file. To locate the template folder, go to your computer's My Documents folder, then to the EMISIG folder, and then the Templates folder. Select and open the file category folder, select your template and send it as an attached file or save it on another type of file transport device such as a thumb drive.

Note 3: If you receive a custom Exercise Builder Template file, you should first download the template file you received then Save As and navigate to your Documents\EMI SIG\Exercise Builder\Templates folder. Select the appropriate template folder (or create a new one) and Save. The custom template will now be available for use when you select a different template in Exercise Builder.

Click the Next Arrow to go to Step 11.3 Exercise Security Plan.

To use the generic Security Plan that comes with Exercise Builder without modification, click the [Generate & Save Document: Exercise Security Plan](#) link.

This step also provides the opportunity to customize the generic security plan included with Exercise Builder for use during your exercises.

To modify the generic security plan, click the [Edit Current Security Plan Template](#) link. This takes you to a Microsoft Word document template named SECURITY\_PLAN\_Temp.docx.

Make whatever changes necessary to meet your site specific requirements.

Save the new Word document template with a new name. Close the Word document to go back to Exercise Builder.

To re-open the Word document template you just created, click the [Select a Different Security Plan Template](#) link to select it.

After review, close the Word document template to go back to Exercise Builder.

Click on the Next Arrow to go to Step 11.4 Exercise Logistical Plan.



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To use the generic Logistical Plan that comes with Exercise Builder without modification, click the [Generate & Save Document: Exercise Logistical Plan](#) link.

This step also provides the opportunity to customize the generic logistical plan included with Exercise Builder for use during your exercises.

To modify the generic logistical plan, click the [Edit Current Logistical Plan Template](#) link. This takes you to a Microsoft Word document template named LOGISTICAL\_PLAN\_Temp.docx.

Make whatever changes necessary to meet your site specific requirements.

Save the new Word document template with a new name. Close the Word document to go back to Exercise Builder.

To re-open the Word document template you just created, click the [Select a Different Logistical Plan Template](#) link to select it.

After review, close the Word document template to go back to Exercise Builder.

This completes the Plans section.

You are now ready to go to the ExPlan section.

Click the Next Arrow to go to Step 12.1 Generating the Exercise Plan (ExPlan).

In this step, you will customize your Glossary and To-Do Item List. You will also select the templates you wish to use for each plan document and generate your ExPlan template.

Click the Next Arrow to go to Step 12.2 Exercise Glossary.

Glossary items may be entered at any time during the exercise development process using the [Add Glossary Item](#) link.

You may Add, Edit or Delete glossary items on this screen by selecting the appropriate button.

To select a glossary term or acronym to be included in your Exercise Glossary, click the box next to the term/acronym. You can also Select All or Deselect All items on the list from this screen. Printing and template development for the glossary are accomplished using the same methodology as discussed previously.

Click the Next Arrow to go to Step 12.3 Review Exercise Glossary.

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Click the Generate & Save Document: Exercise Glossary link to generate, save and open the document.

Click the Edit Current Glossary Template link to edit the currently selected template.

To select a different glossary template to modify or generate the glossary document, click the Select a Different Glossary Template link.

Click the Next Arrow to go to Step 12.4 Exercise To-Do List.

This step allows for the development of an exercise to-do list for use in managing the many tasks and assignments during exercise development. It is not part of the ExPlan.

Like Glossary Items, To-Do Items may be entered at any time during the exercise development process using the Add To-Do Item link.

You may Add, Edit or Delete To-Do Items on this screen by selecting the appropriate button.

Click the Add button. An Add New Exercise To-Do screen opens and provides entry space for the To-Do title and task description.

Since the entry spaces are for text entry, users can place due dates, name of person responsible for the task or any other type of information desired to manage the project. Enter the Title and Description.

If the item has been completed and you just want to record that you did the item, click the Completed box to add a checkmark in the box.

Click OK button to save the item entered.

To edit an exercise To-Do Item, click to highlight the Item and then click the Edit button.

- The Edit Exercise To-Do screen opens. Make necessary modifications and click the OK button to save the changes and return to the Exercise To-Do List.
- To delete an exercise To-Do Item, click to highlight the Item and then click the Delete button. A Confirm Delete screen opens. Click the No button to cancel the deletion. Click the Yes button to delete the Item.
- Click the Down and/or Up buttons to re-order the sequence of the To-Do List Item.

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- The box next to the title is used for tracking To-Do List Item completion.
- When an Item is completed, you can click the box to the left of the completed Item to place a checkmark in the box. You can also denote completion of the task on the edit screen.
- Click the Next Arrow to continue to Step 12.5 Review Exercise To-Do List.

You have completed Step 12.5, Review Exercise To-Do List. You may now generate and review the To-Do List document.

Click the [Generate & Save Document: To-Do List](#) link to generate, save, and open the document.

Click the [Edit Current To-Do List Template](#) link to edit the currently selected template.

Make any desired changes to the template just as you would any Word document. You may change the font, font size, styles, colors, underline/italicize, etc. You may also add any text or graphics to the template you wish to include.

When you are finished making changes, save the template. If you were editing the default template, you will need to save your modifications under a new filename. If you were already editing a modified template, you may save the modifications under the original filename.

If you saved your modified template using a new filename, you will need to select the new template in order to use it. To do this, close the Word template file and click the [Select a Different Template](#) link. Select the new template and click the Open button. The Current Template will now display the name of the new template.

Click the [Generate & Save Document](#) link to generate the document using the new template.

To select a different To-Do List template to modify or generate the To-Do List document, click the [Select a Different To Do List Template](#) link.

Click the Next Arrow to go to Step 12.6 Generating Your Ex Plan Template and Document.

This step explains how the next two steps (12.7 and 12.8) work together to produce the Exercise Plan (ExPlan).

In Step 12.7 you will develop the ExPlan template. In Step 12.8 you will produce your ExPlan as a single Microsoft Word document for printing.



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Be careful not to overwrite a previously generated ExPlan template you may wish to keep. You will need to rename the new template or any other future templates that you develop and want to keep for future use.

Click the Next Arrow to go to Step 12.7 Generate Your ExPlan Template.

As a default, all Exercise Plan sections are selected (have checkmarks) for the development of the template. Sections can be de-selected by unchecking the box to the left of the section title.

The sequence of the Exercise Plan sections may be moved up or down by selecting, or click to highlight, a section and then clicking on the Up or Down buttons until the section is in the desired location. For example, some sites may want the Exercise Glossary first in the sequence of the exercise plan sections.

Once the sections are in the desired sequence, section templates may be selected or edited by clicking the Select or Edit links. Select would be used if an alternate/site specific template(s) were developed for a specific section. Edit would be selected if the template(s) are to be edited and saved for the generation of the exercise plan.

An example of the edit function could be the Exercise Evaluation Guides. For the exercise plan, they may be listed as an attachment. An ExPlan template to make them an attachment can be developed.

Once the templates have been selected or edited, click the Generate/Save ExPlan Template button. If different templates were selected or any templates were edited, you will be prompted to save the template as a different name.

Information presented in these documents is very useful, not only to the site/facility, but also to State and local jurisdictional participants. The information may be required by the planning committee when an exercise is part of a larger Federal exercise.

Exercise Builder has the ability to print Core Capabilities by Exercise Participant or Objectives.

Also available is Exercise Objectives by Core Capability and **(Circle 16)** Core Capabilities Anticipated.

Click the Next Arrow to go to Step 12.8 Review Exercise Plan (ExPlan)

You have completed Step 12.7, Generate the ExPlan Template. You may now generate and review the ExPlan.



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Click the [Generate & Save Document: Exercise Plan](#) link to generate, save and open the document.

Click the [Edit Current ExPlan Template](#) link to edit the currently selected template.

Make any desired changes to the template just as you would any Word document. You may change the font, font size, styles, colors, underline/italicize, etc. You may also add any text or graphics to the template that you wish to include in the generated ExPlan document.

When you are finished making changes, save the template. If you were editing the default template, you will need to save your modifications under a new filename. If you were already editing a modified template, you may save the modifications under the original filename.

If you saved your modified template using a new filename, you will need to select the new template in order to use it. To do this, close the Word template file and click the [Select a Different Template](#) link. Select the new template and click the Open button. The Current Template: will now display the name of the new template.

Click the [Generate & Save Document](#) link to generate the document using the new template.

To select a different ExPlan template to modify or generate the document, click the [Select a Different ExPlan Template](#) link.

Click the [Generate & Save Document: Exercise Plan](#) link to generate, save and open the document in Microsoft Word. Use your word processing software to print the document.

This concludes the video portion of Module 9 — Plans and ExPlan.

There is no activity for Module 9.

You are now ready to go to the video portion of Module 10 — After Action Report.